

User Guide for Access Provider's Electronic Requests



Office of Disability Determinations

October 2015

Electronic Records Express (ERE): Access Provider's Electronic Requests

Instructions for Access Provider's Electronic Requests

This function is a part of the Electronic Outbound Request (eOR) feature. The DDS can electronically send Consultative Examination (CE) requests through the **Electronic Records Express** website to the CE Provider's administrative staff. This function allows the CE administrative staff to view outstanding electronic requests, download request letters and other supporting documentation, and conveniently submit responses to the CE Provider without having to enter any barcode index information.

Begin by logging into the **Electronic Records Express** with your username and password. Under the **Evidence Functions** heading, select **Access Provider's Electronic Requests**. This takes you to the page that allows you to access CE requests sent to the CE Provider from the DDS.

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Electronic Records Express (ERE) OMB No. 0960-0753
[Paperwork Reduction Act](#)

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Help & Support

Email: EETechSupport@SSA.gov

Call Us (toll free): **1-866-691-3061**

[User Resources](#)

For your security, please log out and close all Internet windows when you are finished.

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 2

Electronic Records Express (ERE): Access Provider's Electronic Requests

Select Provider

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ERE: Access Provider's Electronic Requests

Provider: Joan Doan **Request Type:** Open Requests

Show User Resources

Step 1—Select Provider

- Select a **Provider** from the dropdown box. Only CE Providers associated with your username will display in the drop down list.
- Select a request type by clicking the arrow from the drop-down box under **Request Type** and clicking **Show**.
- If you do not wish to continue with the transaction and you want to return to the homepage, select the **ERE Home** button that would be shown on the bottom of the page.

Access Provider's Electronic Requests – Open Requests

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ERE: Access Provider's Electronic Requests

Provider: Smith, Test **Request Type:** Open Requests

Show User Resources

Patient Name	SSN (Last 4)	Request Date	Appt Date	Appt Time	Location	Request Status	Payment Status	Payment Request
Oneil, Paul	0730	09/15/2014	11/09/2014	07:30 AM	North East Hospital	NEW	NEW	
Smithford, Hellen	7340	06/01/2014	01/05/2014	09:17 AM	Security Mall	PENDING		

ERE Home

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Step 2—View Provider's Electronic Request—Open Requests

- This page allows you to view and sort all requests received from the DDS.
- You may select a column header to sort the displayed information by that column in ascending or descending order. Sorted columns display a small arrow adjacent to the column header. The column headers are:
 - **Name**
 - **Last 4 of SSN**
 - **DOB**
 - **Request Date**
 - **Appt Date**
 - **Appt Time**
 - **Location**
 - **Follow-up**
 - **Request Status**
 - **Payment Status**
 - **Payment Request**
- Select the claimant's name in the **Patient Name** column to view an individual request.
- Select the **ERE Home** button to go to the Electronic Records Express Home page.

Request Status Definitions

- **New**— A new request that has not been opened.
- **Pending**—A request that has been opened/viewed.
- **Prepared**—A CE Admin staff has submitted a prepared report for the request.
- **Responded**—Response submitted by provider through ERE Website.
- **Accepted**—The DDS received the request response.
- **Cancelled**—The DDS cancelled the request.
- **Updated-** Updated initial request

Note: The Electronic Request will be removed from the list based on the retention days received with the request if less than 120 days. Otherwise, Electronic Requests are removed from the list 120 days from the Request Date.

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View/Submit Consultative Examination (CE) Request – Prepare Report for Provider (eOR)

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Text Size

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ERE: View / Submit CE Request

Patient Name: Hellen Smithford

Patient DOB: 10/05/1939

Request Type: Consultative Exam

Request ID: 20150108BRYN_002 D

Requesting Office: XX - DEMO/TESTDDS REL12 [V76]

Location: Organization Name 1234567890 max1234567890123456781234567, Street 1 Street 2 Street 3 Street 4, Ellicott City, MD 21045

Patient SSN: XXX-XX-7340

Provider Name: Mr Testfirst testmid Lasttest

Request Date: 06/01/2014

Disability Examiner: Joe B

CE App't Date & Time: 01/05/2014 09:17 AM EST

[? User Resources](#)

Service Items

Service Item 1:
Item Description: test101 Xray1
Item Code: 200

Service Item 2:
Item Description: test102 Xray2
Item Code: 201

Service Item 3:
Item Description: test103 Xray3
Item Code: 202

Service Item 4:
Item Description: test104 Xray4
Item Code: 203

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Service Item 5:

Item Description: test105 Xray5

Item Code: 204

Service Item 6:

Item Description: test105 Xray6

Item Code: 205

Request Details

What's Changed:

Special Instructions:

Special Goes Here

Documentation:

File Name	Date Added
Request Letter	01/08/2015
Authorization To Disclose Information	01/08/2015
Supporting Documentation	01/08/2015

Request Response

Select a response:

- ☒ Prepare Report for Provider
☐ Send No Show Response

Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .bt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

Electronic Records Express (ERE): Access Provider's Electronic Requests

The screenshot shows a web form for submitting a request. At the top, there is a 'Document Type' dropdown menu. Below it is a 'File 1:' section with a 'Choose File' button, a 'No file chosen' status, a 'Delete' button, and an 'Add File' button. The next section is 'Additional Information', which includes a 'Comments (Optional)' field with a 16,000 character limit and a 'Characters remaining: 16000' indicator. Below this is the 'Consultative Examination Authorization Agreement' section, which contains a paragraph of text and a checkbox labeled 'I have read and agree with the Agreement above.' At the bottom of the form are three buttons: 'Send to Provider' (in blue), 'Previous', and 'Cancel'.

Step 3 - View/Submit Consultative Examination (CE) Request – Prepare Report for Provider (eOR)

- To view the request documentation, click on the blue document heading in the **Documentations** section.
- Select the appropriate radio button in the Request Response section.
- Select the button to attach and upload files for this patient. (Do not send files that are password protected.) The **Choose file** window appears.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.

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Electronic Records Express (ERE): Access Provider's Electronic Requests

- Select the **Add File** button to send additional files. Only files for the SSN in Step 1 can be sent with this transaction.

Note: A maximum of 10 files may be sent for one individual by selecting *the* **Add File** button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif.**


Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- Type **Comments**, if needed. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Select the **Send to Provider** button to send the CE report to the CE Provider's ERE inbox.


Electronic Records Express (ERE): Access Provider's Electronic Requests

Confirmation

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ERE: View / Submit CE Request

 Thank you for your submission.
Prepare CE Report Submission - Tracking Information

[User Resources](#)

Tracking Number: **14AD6C45C7295826N**
Submitted on: 01/10/2015 at 09:13 PM EST

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

 [Print this page](#)

Submission Summary

Tracking Information

Patient & Appointment Information

Patient Name: Hellen Smithford
Patient SSN: XXX-XX-7340
Patient DOB: 10/05/1939
Provider Name: Mr Testfirst testmid Lasttest
Request Type: Consultative Exam
Request Date: 06/01/2014
Requesting Office: XX - DEMO/TESTDDS REL12 [V76]
Request ID: 20150108BRYN_002 D
Disability Examiner: Joe B
CE App't Date & Time: 01/05/2014 09:17 AM EST
Location: Street 1 Street 2 Street 3 Street 4, Ellicott City, 21045

Uploaded File(s)

Attached Files

File Name	File Size
eOR.doc	42 KB
Total File Size:	42 KB

Comments: Comments were added
You have electronically signed.

[Prepare Another CE Report](#) [ERE Home](#)

Electronic Records Express (ERE): Access Provider's Electronic Requests

Step 4—Confirmation

- After your submission uploads, Electronic Records Express provides a **Confirmation** page that provides a tracking number for you to keep and use if you want to check on the status of your submission.
- If you do not receive the Confirmation page, you should resubmit the materials.
- If you continue to have transmitting problems, contact the Electronic Records Express Website Help Desk at EETechSupport@ssa.gov or 1-866-691-3061.
- If you have additional CE reports to submit, you may select **Prepare Another CE Report** button. This takes you back to the screen in Step 1.

NOTE: We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

Electronic Records Express (ERE): Access Provider's Electronic Requests

Access Keys

This application contains access keys to improve navigation and provide information. You will find a list of these keys in the table below:

Button/Link	Access Key
Show	s
ERE Home	n
Submit	p
Prepare Another CE Report	n
Next	n
User Resources	u

Other keyboard commands, hotkeys or access keys will vary based upon browser and the version of the browser that you are using. A list of these commands can be found in the Help section of your browser. The Help feature can be located on the Menu bar of your browser or by using the F1 function key on the keyboard. Any assistive devices that you may be using will also have a list of these shortcut keys in their Help section.

Note: To use these keys select the “Alt” or “Ctrl” button on your keyboard and the access key simultaneously.

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How to Get Important Information about Electronic Records Express Website Availability

You may subscribe to receive ERE website availability notifications through the GovDelivery services on the Social Security Administration's Electronic Records Express internet website: [Social Security Online: Electronic Records Express](https://socialsecurityonline.gov/electronicrecordsexpress/). Please see the following website for *GovDelivery* FAQs: <https://subscriberhelp.govdelivery.com/hc/en-us>

To subscribe to the ERE website availability notification, follow these instructions:

- Click “**Sign Up for Email/Text ERE System Notifications**” on the Electronic Records Express Home Page,
- Type your email address and select **Submit**
- Confirm your email address
- Select “Send updates immediately by email.”
- Choose an optional password
- Select **Submit**
You will receive a “Success” confirmation.
- Select **Close** to exit.

****Once you have subscribed, you will receive a Subscription Acknowledgement e-mail with instructions on how to update your user profile****